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India Video Games Market Outlook to 2018

- Rising Popularity of Mobile and Online Games to Lead Growth

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INDIA VIDEO GAMES INDUSTRY SIZE BY REVENUES, FY'2008-FY'2013

Video game industry in India, which is hugely driven by retail sales of software and hardware, registered revenues of INR ~ million in FY'2013. Revenues from video games in FY'2009 were INR ~ million and increased to INR ~ million in FY'2010 with a sharp growth of 39.9%. This was majorly on account of a strong growth...

... Although the software segment of the video games industry fared well witnessing a ~% growth in FY'2013, the video game industry in India had grown at a CAGR of 34.5% from INR ~ million in FY'2008 to INR ~ million in FY'2013.

Figure: India Video Games Market Size on the Basis of Revenues in INR Million, FY'2008-FY'2013



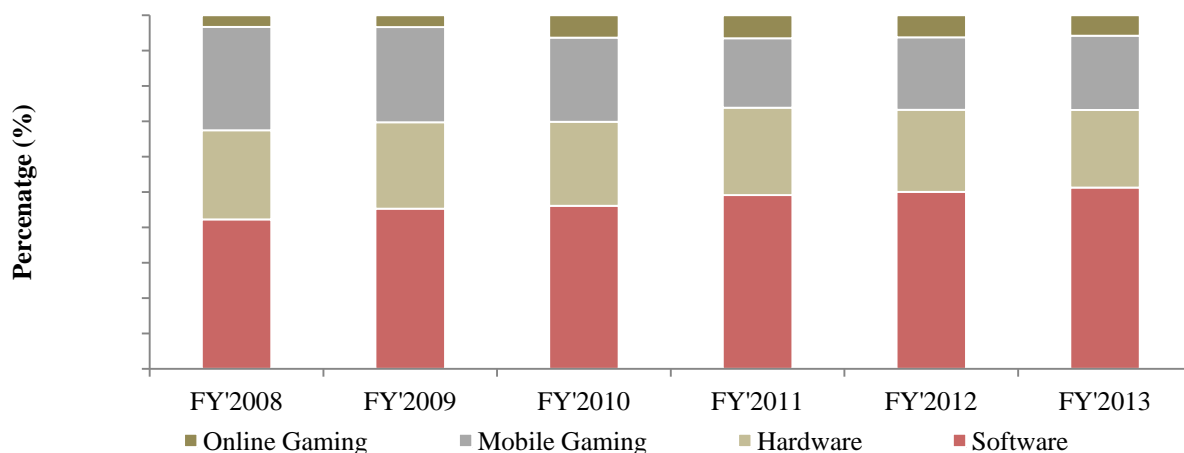
INDIA VIDEO GAME MARKET SEGMENTATION

BY HARDWARE, SOFTWARE, MOBILE GAMING AND ONLINE GAMING, FY '2008-FY '2013

Spending on video game hardware, which is comprised of handheld video game consoles and static video game consoles, has declined for the past few years with ~% share in FY'2013 from ~% share in FY'2008. On the other hand, the purchase of video games software, including games for handheld video game consoles, PCs and static video game consoles has been rising over the period of FY'2008-FY'2013, reaching its highest in FY'2013 with ~% share of the overall India video games industry.

Although the share of mobile gaming has been declining over the past few years but it contributed a significant ~ % share to the overall video games industry in FY'2013, thus creating an entire game development ecosystem of content developers and aggregators in India...

Figure: India Video Games Market Segmentation by Hardware, Software, Mobile gaming and Online gaming on the Basis of Revenues in Percentage, FY'2008-FY'2013



PRODUCT SHARES OF MAJOR PLAYERS IN INDIA VIDEO GAME HARDWARE MARKET, FY '2013

... Sony dominated the video games hardware market in terms of total installed base in India which stood at ~million in FY'2013. The distribution of Sony's play station products in the overall video games hardware space comprises play station 2 with the maximum share of ~% in terms of total installed base of ~ million.

Microsoft's Xbox 360 was the second largest selling seventh generation console in India video games hardware market after play station 3 with ~% market share and a total installed base of ~ million in India in FY'2013. This share was supported by factors such as technological expertise...

Figure: Product Shares of Major Console Brands in India Video Games Hardware Market on the basis of Total Installed base in India, FY'2013

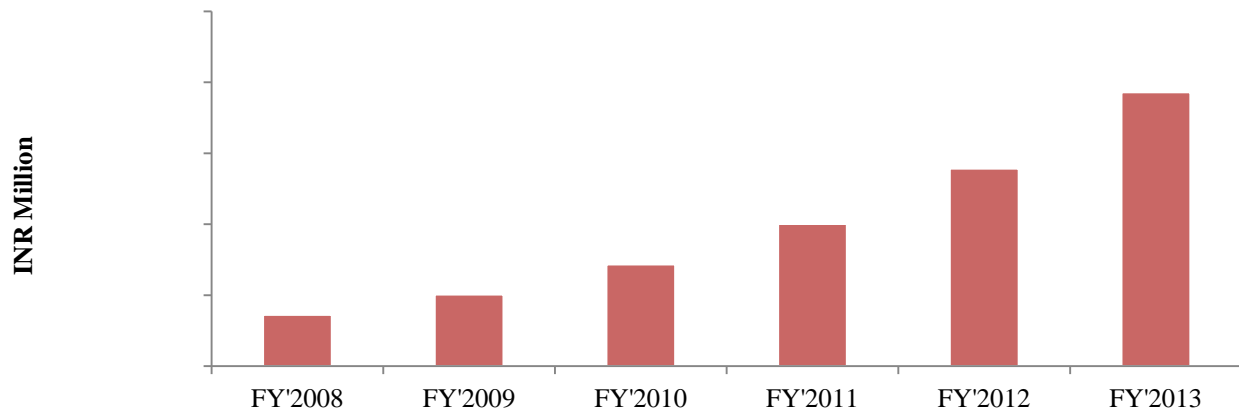
Brands	FY'2013
Play Station 2	
Play Station Potable	
Play Station 3	
X Box 360	
Nintendo DS	
Nintendo Wii	
Total	

INDIA VIDEO GAME SOFTWARE MARKET SIZE, FY '2008-FY '2013

The video software market witnessed revenues of INR ~million in FY'2013, growing from INR ~ million in FY'2008 at a CAGR of 39,8%. The video game software market has always been majorly driven by new game releases across all platforms...

... As a result, the profits of game developers has come down and discouraged investment in this market. In addition, the retail sales of video game software in India have also demonstrated an increase in revenues and the number of units sold respectively in the past few years.

Figure: India Video Games Software Market Size on the Basis of Revenues in INR Million, FY'2008-FY'2013



PRODUCT SHARES OF MAJOR PLAYERS IN INDIA VIDEO GAME SOFTWARE MARKET, FY '2013

... Sony is the largest player in the video games software market in India. Their console software revenues were highest from the product play station 3, totaling to nearly INR ~ million in FY'2013, as it has the second largest installed base of ~ million after Play Station portable.

The second largest software revenues for Sony were for the product PlayStation 2, with INR ~ million revenues in FY'2013. This is because PS2 games are cheaper as compared to PS3 games and the installed base of PS 2...

Table: Product Shares of Major Players in India Video Games Software Market on the Basis of Revenues Contribution in USD Million, 2013

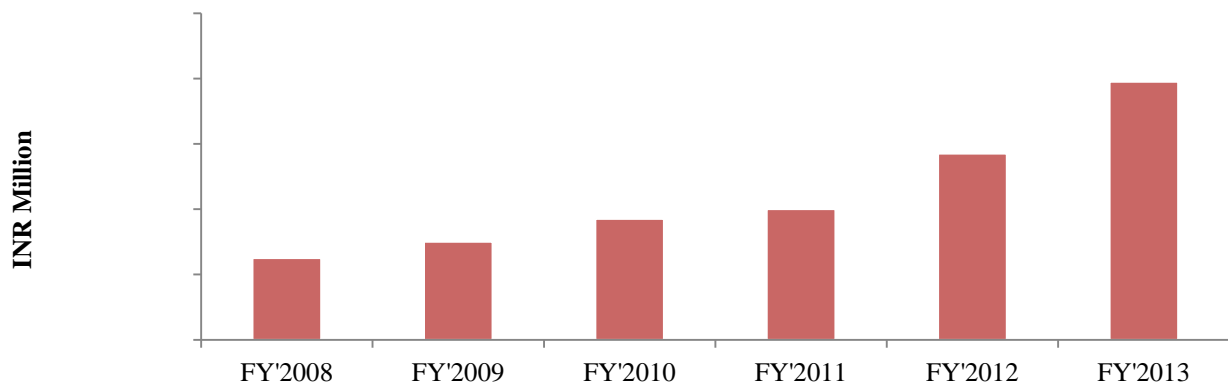
Players	Total Software Revenues
PS 3	
PS 2	
PSP	
Nintendo DS	
Nintendo Wii	
Xbox 360	

INDIA MOBILE GAME MARKET SIZE, FY '2008-FY '2013

... The mobile games market was valued at INR ~ million for FY'2013, growing from INR ~ million in FY'2008 supported by a multitude of factors such as rising penetration of smart phones, growing influence of tablets and escalating mobile subscriber base, which has given people an exposure to mobile games...

India has been experimenting aggressively the transition of consumers from feature phones to smart phones, with their varied advanced applications and low cost. This is one the major trend which is driving the mobile games market in India presently and is expected to do so in the coming years...

Figure: The India Mobile Games Market Size on the Basis of Revenues in INR Million, FY'2008-FY'2013

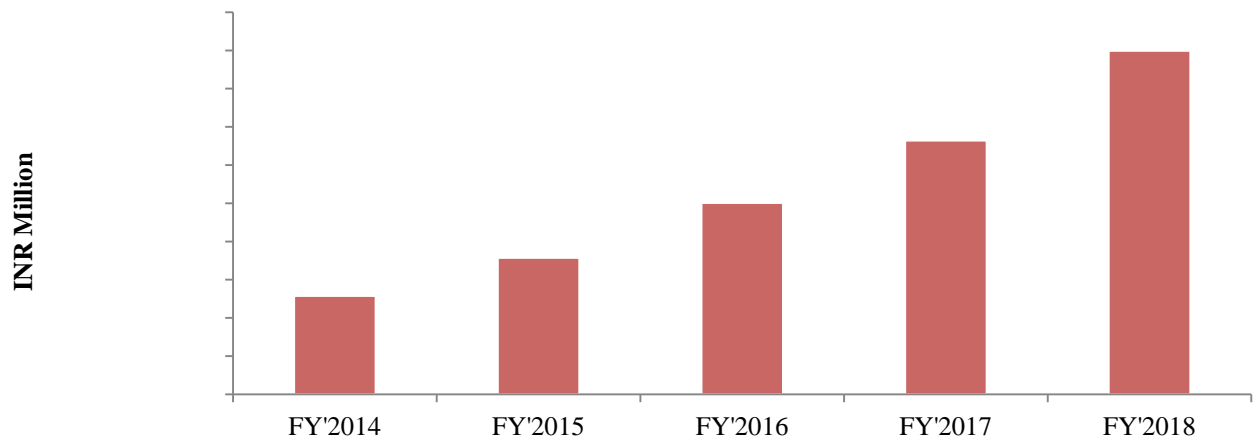


INDIA VIDEO GAMES INDUSTRY FUTURE OUTLOOK AND PROJECTIONS, FY'2014-FY'2018

...Revenues from the video game industry in India are expected to expand to INR ~ million in FY'2018, growing with a CAGR of ~% from FY'2013 to FY'2018. The highest contribution to this growth is expected to come from the mobile gaming segment which will grow significantly at a CAGR of ~ % till FY'2018.

Casual and social gaming, a new genre of gaming that adds the social factor to the games, has appealed to a larger and diverse Indian population, thus establishing a strong foothold through various platforms...

Figure: India Video Games Industry Future Projections on the Basis of Revenues in INR Million, FY'2014-FY'2018



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